TRAINING MANUAL

FOR VISITORS   PART I

An Instruction Guide

STAFF DEVELOPMENT SERVICES

JULY 1951

ILLINOIS PUBLIC AID COMMISSION
CHICAGO   SPRINGFIELD

Illinois Public Aid Comm

TRAINING MANUAL FOR VIS

* * * * *

PART I

An Instruction Guid

IN-SERVICE TRAINING COMMITTEE

James M. Brown, Chairman, Regional Director, Reg
David Ross, District Representative, Region I
Morton N. Hoyt, Public Aid Representative II, Sa
Beatrice Bedard, Superintendent, Kankakee County
Maxine P. Eaton, Superintendent, Wayne County
Ruth Garrett, Superintendent, Lawrence County
M. Eloise Wymer, Case Work Supervisor, Vermilion
Frank Daniels, Visitor II, Greene County
Frank Brzygot, Welfare Administrative Aid, Centr
Edith Wallace, Visitor I, McDonough County
Beth Harrell, Visitor I, Clay County
Mae Staiger, Visitor I, Saline County
Margaret Greene, Clerk, Fulton County

SUBCOMMITTEES

PRE-INSTITUTE INDUCTION

Beatrice Bedard, Chairman, Superintendent, Kankakee County
Joseph D. Southwick, District Representative, Region VI
Emil H. Klein, District Representative, Region VI
Ruth Harter, Consultant, Division of Standards and Services, Region VI
Mae Staiger, Visitor I, Clay County
Beth Harrell, Visitor I, Saline County

POST-INSTITUTE INDUCTION

Maxine P. Eaton, Chairman, Superintendent, Wayne County
David Ross, District Representative, Region I
Frank Brzygot, Welfare Administrative Aid, Central Office
M. Eloise Wymer, Case Work Supervisor, Vermilion County
Marguerite Frischauf, County Superintendent, LaSalle County

EX OFFICIO MEMBERS

Dr. Saul Kasman, Co-ordinator, Staff Development Services
James A. Logan, Supervisor of Training, Springfield Institute

Illinois Public Aid Commission

TRAINING MANUAL FOR VISITORS

* * * * *

PART I

An Instruction Guide

IN-SERVICE TRAINING COMMITTEE

James M. Brown, Chairman, Regional Director, Region V
David Ross, District Representative, Region I
Morton N. Hoyt, Public Aid Representative II, Sangamon County
Beatrice Bedard, Superintendent, Kankakee County
Maxine P. Eaton, Superintendent, Wayne County
Ruth Garrett, Superintendent, Lawrence County
M. Eloise Wymer, Case Work Supervisor, Vermilion County
Frank Daniels, Visitor II, Greene County
Frank Brzygot, Welfare Administrative Aid, Central Office
Edith Wallace, Visitor I, McDonough County
Beth Harrell, Visitor I, Clay County
Mae Staiger, Visitor I, Saline County
Margaret Greene, Clerk, Fulton County

SUBCOMMITTEES

PRE-INSTITUTE INDUCTION

Beatrice Bedard, Chairman, Superintendent, Kankakee County
Joseph D. Southwick, District Representative, Region VI
Emil H. Klein, District Representative, Region VI
Ruth Harter, Consultant, Division of Standards and Services, Region VI
Mae Staiger, Visitor I, Clay County
Beth Harrell, Visitor I, Saline County

POST-INSTITUTE INDUCTION

Maxine P. Eaton, Chairman, Superintendent, Wayne County
David Ross, District Representative, Region I
Frank Brzygot, Welfare Administrative Aid, Central Office
M. Eloise Wymer, Case Work Supervisor, Vermilion County
Marguerite Frischauf, County Superintendent, LaSalle County

EX OFFICIO MEMBERS

Dr. Saul Kasman, Co-ordinator, Staff Development Services
James A. Logan, Supervisor of Training, Springfield Institute

FOREWORD

It has long been recognized that a good staff development program is a necessary and important function of the administrative set-up of a public assistance agency.
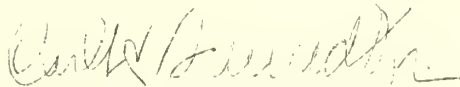
Staff development is a dynamic process aimed at the continued growth of each member of the agency in the effective and efficient performance of their respective functions.

The major objective of the program is to provide the necessary training facilities to staff members at all levels so that they may realize their fullest potentialities thus improving the agency's services to the client and community.

The Illinois Public Aid Commission has felt for some time the need for a systematized and organized training program to meet the needs of staff members. Due to many pressures and unavoidable causes, such a program has long been delayed.

We are, therefore, very happy to announce that the Illinois Public Aid Commission has embarked upon an organized training program of which this TRAINING MANUAL is the first product.

Grateful acknowledgments are made to the In-Service Training Committee and other staff members whose untiring efforts made this venture possible.

CARL K. SCHMIDT, JR.
Executive Secretary

INTRODUCTION

The Training Manual for Visitors as developed by the In-Service Training Committee consists of two parts:

    PART I—TRAINING MANUAL FOR VISITORS (An Instruction Guide)—A guide for county department supervisory staff as well as the Supervisor of Training at the Springfield Institute.

    PART II—CONTENTS OF TRAINING MANUAL FOR VISITORS—Skills and knowledge for county department staff. This section contains objectives, areas of knowledge, and selected bibliography. Release of this section is contemplated in the near future.

Part I—THE TRAINING MANUAL FOR VISITORS is designed to serve a threefold purpose:

I. PRE-INSTITUTE INDUCTION

This section of the Training Manual serves as a guide to county superintendents and case work supervisors in the induction of new visitors. It covers a period beginning with the first day of the visitor's activity in the county department and continues until he is ready to attend the Training Institute in the Springfield Office of the Illinois Public Aid Commission.

The visitor may attend the Institute as early as the eigth day of his employment with the agency, or as late as his twelfth month. The Pre-Institute Guide is to be used as a flexible tool in the gradual assimilation of the body of knowledge inherent in the visitor's job.

Prior to the visitor's attendance at the Springfield Institute, a Progress Report covering the Pre-Institute period should be sent to the Supervisor of Training.

II. SPRINGFIELD INSTITUTE

This section of the Training Manual serves as a guide to the Supervisor of Training at the Springfield Institute. Again, the Supervisor of Training will consider it as a flexible tool, inasmuch as he will get visitors with different backgrounds and different lengths of service. Some visitors will be far more advanced than others in their understanding of policy and procedure.

The Progress Report by the county superintendent will be of value to the Supervisor of Training in eliminating excessive duplication of training. An EVALUATION OF TRAINEE (IPAC Form Per-122) will be submitted to county superintendents at the end of the two week training period.

III. POST-INSTITUTE TRAINING

This section of the Training Manual serves as a guide to the county superintendent or case work supervisor, to cover the remainder of the probationary period, or if the worker has already completed the probationary period, as an additional training tool for continuous growth and development on the job.

IV. OBJECTIVES OF ORIENTATION

The objectives which an orientation period[1] is expected to accomplish should be the basis for planning the work of the new visitor during this period. They should be made clear to the visitor at the outset, so that he will be aware of the goals toward which he is aiming. Some of the major objectives of a visitor's orientation period are as follows:

1. To Give an Understanding of the Objectives of the Commission and of the Functions of the Visitor. The orientation period is intended to give the new visitor an opportunity to learn what his functions are to be and to discuss them with the supervisor, and then to put them gradually into practice by working under the direction of selected cases. The processes which the new visitor learns must be related to the agency's objectives if they are to have real meaning for him. He must understand that the steps taken to determine eligibility of recipients are necessary because the eligibility of recipients is defined by law. Likewise he must understand the difference between a needs program and a pension program before he can effectively use policies established to determine need.

2. To Familiarize the Visitor with Procedures of the Commission. The process of familiarizing a visitor with procedures means acquainting him with the basic forms he will need to use, the controls for organizing the work in the county department and the methods of operation prescribed by the Commission. An explanation of the agency's personnel practices also is included.

3. To Familiarize the Visitor with Policies of the Commission. It is important for the visitor to understand certain fundamental policies of the Commission before he begins to interview recipients or other persons in the course of his work. It is not expected that he will learn all the policies of the Commission during his orientation period, but he should become familiar with the manual and bulletins to which he can refer for future knowledge of policy.

_____

[1]The term "Orientation Period" covers the three planned phases of training: (1) Pre-Institute Induction, (2) Springfield Institute, (3) Post-Institute, the remainder of the visitor's probationary period.

4. To Give the Visitor an Understanding of the Administrative
    Relationships Within the Commission. A new visitor must
    learn to see his job in relation to the jobs of other mem-
    bers of the staff. He must understand the relationship be-
    tween the Central Office staff, the field staff, and the
    county department staff. This will include an interpreta-
    tion of the supervisory process as it is used in the work
    of the Commission.

5. To Acquaint the New Visitor With the Structure of the State
    and Local Welfare Agencies With Which He Will Work. Only a
    brief survey of the subject of other agencies can be given
    during an orientation period, but it will serve as a guide
    to the visitor for continued learning and study in this area.

6. To Familiarize the Visitor With the Historical Background
    and the Development of Public Welfare. It is a recognized
    principle of education that the understanding of contem-
    porary events and institutions is increased by knowledge
    of historical developments leading up to the present. This
    is particularly true in the field of public welfare. A
    survey of some of the conditions which have resulted in the
    establishment of welfare programs and a review of the various
    steps through which they have passed during the past few
    decades will broaden the new visitor's conception of the
    field he is entering.

7. To Develop the Visitor's Ability to Understand and Work
    With People. During the orientation period the visitor
    cannot be expected to develop completely his ability to
    work with people, but he should begin to realize the value
    of skill in working with them and the need to increase his
    understanding of human nature. He must also begin to learn
    to evaluate his own attitudes in the light of their effect
    upon the performance of his job.

8. To establish a Basis for the Continued Improvement of
    Performance. The orientation period is the first step in
    the agency's plan for developing staff competence and
    serves as a basis for continued improvement. It does not
    give the visitor all the information and skills he must
    have to carry on his work adequately but leads into an
    understanding use of the agency facilities for supervision
    and consultation.

V. METHOD OF ORIENTATION

The orientation process is carried out in the county department by com-
bining the following methods: Conferences between the visitor and the
supervisor during which information is imparted and discussed; assign-
ments of selections for independent reading and study by the visitor;
assignment of specific tasks on cases which he will eventually carry;

assignments of simple cases; and demonstrations of ways of organizing work and controls used. These methods should be combined during the orientation period to provide variety and stimulation.

In addition to the process which takes place in the county department, the Springfield Institute was planned to integrate the work done in the county department with that of the Institute. The Outline of instruction in the Springfield Institute gives the supervisor in the county department an idea of what is given in the Institute. Thus the joint planning insures that there are no gaps between what the visitor learns at the Institute and what is covered in the county department.

Illinois Public Aid Commission

TRAINING MANUAL FOR VISITORS

PRE-INSTITUTE INDUCTION

* * * * *

I. INTRODUCTION BY COUNTY SUPERINTENDENT

    A. Introduction to Office Staff and Immediate Supervisor
    B. Assigning of work space
    C. Local Personnel Practices fully explained--General Personnel
        Practices briefly stated
    D. Discuss training, education, background, special interests of
        visitor--learn visitor's attitude toward Public Assistance and
        dependency. Explain plan for Institute.

II. BRIEF EXPLANATION BY SUPERVISOR OF FUNCTION OF STATE AGENCY AND
COUNTY DEPARTMENT

    A. Information on the Public Assistance Programs as Administered
        by the Illinois Public Aid Commission

        1. Categorical Assistance Programs

            a. Old Age Pension
            b. Aid to Dependent Children
            c. Disability Assistance
            d. Blind Assistance

        2. General Assistance
        3. Characteristics of Categorical Programs

            a. Needs Basis
            b. Money Payments
            c. Confidentiality of Case Records
            d. Right of Appeal

    B. Visitors job as related to the programs

        1. Establish original and continued eligibility
        2. Provide for financial assistance and social services to
            persons who meet the eligibility requirements
        3. Interpret agency's services to the recipient
        4. Maintain necessary records

    C. Administration of County Office

        1. How work is distributed
        2. Tools of Administration

            a. Public Assistance Code of Illinois
            b. Manual of Policies and Procedures
            c. Organization Chart of Local County Department

       d. Visitor's Control Cards
       e. Budget boxes
       f. Financial Cards, Authorizations and Recap Sheets
       g. Record Files

III. INTRODUCTION TO OLD AGE PENSION PROGRAM

    A. Assignment for Reading

       1. Informational Pamphlet
       2. One fairly simple approved Old Age Pension Case in new visitor's case load
       3. Instruction to visitor on how to read a case

          a. Note applicant's statements on application form relative to all requirements covered in informational pamphlet
          b. Note follow-through on visitor's process in establishing eligibility
          c. Note comments of visitor on any services as indicated

    B. Conference on Reading Assignment

    Discussion of Old Age Pension eligibility requirements and the social and economic needs of the family as obtained from the case record and pamphlet. (Note--The visitor should be furnished a folder of forms used in OAP) From this should emerge general ideas in the establishment of:

       1. Age, residence, and citizenship with forms and recording used in process

          a. Brief summary of possible proofs with MANUAL references should be given for future use.

       2. General ideas on the EXTENT OF NEED

          a. Resources

             (1) Assets

                (a) Amount of maximum reserve and how it is established--(Note application Form SS-268 and points covered under assets, use of insurance Form SS-121, letter to financial institutions--Form SS-46, and consent and authority to examine Financial Records--Form SS-34)

            (2) Responsible Children

                (a) Explain use of Form SS-158
                (b) Show relative contribution guide and explain use
                (c) Give MANUAL references for future use

(3) Income

(a) Employment
(b) OASI and Railroad Pension
(c) Unemployment Compensation
(d) Government Pension (Federal, State, or Local)
(e) Note points listed under INCOME on Form SS-99

b. Determination of economic needs

(1) Budget

(a) Give copy of monthly budget chart and explain how amounts are determined

1) Food surveys
2) Clothing surveys, etc.

(2) Discuss basic needs using chart and budgets in case records
(3) Give a brief and general explanation of medical care program

c. Determination of Deficit or net economic need

(1) Subtract income from budgeted needs
(2) Difference rounded to nearest dollar equals amount of grant

(a) Minimum grant $ 3.00) This may vary from time to
(b) Maximum grant $70.00) time. Explain escalator
) clause.

C. Assignment of two more OAP cases for reading and analysis with the suggestion that MANUAL references should be used as needed. Discussion of questions raised by new worker in establishing eligibility for OAP.

D. Preparation for Field Visit

1. Assignment of field visit on a specific case for a specific purpose
2. Help make outline of points to be covered in visit
3. Discuss interviewing process and taking notes

E. Conference after Field Visit

1. Discuss and analyze visitor's experience and information obtained in visit
2. Help visitor prepare for dictation
3. Help visitor record information secured

F. Conference after evaluation by Supervisor of record of first visit

    1. Discussion

        a. Stress good points first: Decide what information had already been secured and recorded.
        b. Make suggestions for improvement: Decide what information is still lacking
        c. Help worker decide what to do with the information she has obtained
        d. Help worker with future plans

IV. INTRODUCTION TO BLIND ASSISTANCE PROGRAM

A. Assignment for Reading

    1. BA Pamphlet
    2. Two simple case records
    3. Discuss similarities to, and differences from OAP Program at next scheduled conference
    4. Discuss at conference special areas of work with the blind, co-operating services, etc.

B. Conference--Follow-up on reading

    1. Discuss Eligibility requirements for BA
    2. Give visitor folder of BA Forms

C. Same as in OAP
D. Same as in OAP
E. Same as in OAP
F. Same as in OAP

V. INTRODUCTION TO AID TO DEPENDENT CHILDREN PROGRAM

A. Assignment for Reading

    1. ADC informational pamphlet
    2. Two simple case records
    3. Discuss similarities to and differences from OAP and BA Programs

B. Conference after reading. Discussion of ADC Eligibility requirements as gained from pamphlet and case records read. The objective of this conference is to give visitor general instructions on eligibility and introduction to social problems. (Note: The various steps used in the OAP Program should be the same for BA, ADC, and DA, that is, the pattern of introduction should be the same) Specific ideas should emerge on:

    1. Cause of dependency
    2. Family relationship
    3. Ages of children

      4. Residence of children and applicant (Note: Specific MANUAL references should be given by supervisor for future use and folder of ADC Forms should be issued)

      5. Extent of Need

         a. Assets

           (1) Maximum reserve
           (2) Insurance

         b. Actual or possible child support and possibilities of legal action against father
         c. Other income

           (1) Employment
           (2) OASI
           (3) Government Pension (Federal, State or Local)
           (4) Other

      6. Determination of Need (See OAP III, B, C).

  C. Preparation for Field Visit

      1. Conference with visitor on questions raised by cases read and a review of points in previous conference
      2. Assignment of case to be prepared for Field Visit
      3. Visitor should decide on necessary points to be covered in visit.
      4. Suggest helpful Manual References
      5. Conference after visitor has read the case and made tentative plans in regard to visit on the case. Discuss plan for visit on specific case assigned.

  D. Conference after Field Visit--Same as III, E, OAP.
  E. Conference on results of investigation--Same as III, F, OAP.

VI. INTRODUCTION TO DISABILITY ASSISTANCE PROGRAM

Give a brief explanation of the program as it is now being administered. The same procedure developed for the OAP, ADC, and BA Programs can be applied for the Disability Assistance Program.

* * * * *

PROGRESS REPORT BY COUNTY SUPERINTENDENT OR CASE WORK SUPERVISOR ON TRAINEE

The county superintendent or case work supervisor who has assumed the responsibility of training the new visitor and has used the PRE-INSTITUTE INDUCTION section of the manual as a guide should indicate in a PROGRESS REPORT on the trainee, the areas of the outlined material which were not covered in the Pre-Institute Training Period.

The visitor is notified by letter when to report for training at the Institute. The county superintendent receives a copy of the letter. The PROGRESS REPORT should be completed and sent to the Supervisor of Training, Springfield Institute, when this letter is received.

If necessary the superintendent or case work supervisor may indicate by special instructions to the Supervisor of Training the kind of activities the new visitor has been engaged in or the kind of cases, if any, he has been assigned to. This information will be most useful to the Supervisor of Training in making the training period of the new visitor at the Institute continuous and integrated with training in the county department.

* * * * *

INSTITUTE OUTLINE

First Day

R U L E S   F O R   O R I E N T A T I O N   C L A S S

I. Hours

          8:30 A.M. to 10:00 A.M.--Classes
          10:00 A.M. to 10:15 A.M.--Recess
          10:15 A.M. to 12:00 Noon--Classes
          12:00 Noon to 1:00 P.M.--Lunch
           1:00 P.M. to 3:00 P.M.--Classes
           3:00 P.M. to 3:15 P.M.--Recess
           3:15 P.M. to 5:00 P.M.--Classes

II. READING ASSIGNMENTS will be prepared on visitor's time
III. An attendance record will be kept daily
IV. Report of attendance will be forwarded to visitor's county department
V. Future hotel reservations will be visitor's responsibility
VI. Expenses will be shown on visitor's Regular F-10

I N T R O D U C T I O N

I. PAST EXPERIENCE--The Training Supervisor discusses the visitor's edu-
cation, experience, and attitudes towards public welfare, in order to
help evaluate the trainee.

    A. Misconceptions with respect to the popular notion of the term
        social work, public welfare, public assistance, etc.
    B. Retraining--The need, if indicated, to retrain faulty or errone-
        ous attitudes toward social welfare.

II. WHAT IS A SOCIAL WORKER OR PUBLIC ASSISTANCE WORKER?--Definition of
the term social worker as given in the Dictionary of Occupational
Titles, including variations of the term as applied to:

    A. Private Agency
    B. Public Agency

III. THE MEANING OF THE TERM:

    A. General Welfare
    B. Public Welfare

IV. OBJECTIVES OF THIS TRAINING

    A. Attitudes
    B. Skills
    C. Knowledge as developed by:

        1. Case Work and Social Case Work Philosophy
        2. Interviewing Techniques
        3. Recording Process, etc.

<div align="center">

* * * * *

ASSIGNMENT OF PAPER ON TRAINEE'S BACKGROUND

* * * * *

P E R S O N N E L   P R A C T I C E S

</div>

    I. ORGANIZATION OF MERIT SYSTEM COUNCIL

   II. CLASSIFICATION PLAN

  III. COMPENSATION PLAN

   IV. APPLICATIONS AND EXAMINATIONS

    V. REGISTERS

   VI. CERTIFICATION OF ELIGIBLES

  VII. APPOINTMENT

 VIII. PROBATIONARY PERIOD

   IX. PROMOTIONS

    X. TRANSFERS AND DEMOTIONS

   XI. SEPARATION, TENURE AND REINSTATEMENT

  XII. APPEALS

 XIII. ATTENDANCE AND LEAVE

  XIV. SERVICE RATINGS

   XV. POLITICS AND RELIGION

  XVI. OTHER EMPLOYMENT

 XVII. STATE RETIREMENT

<u>Second Day</u>

<u>HISTORICAL BACKGROUND OF THE FIELD OF PUBLIC WELFARE</u>

    I.   ANCIENT TIMES

   II.   THE EARLY CHURCH

  III.   MEDIEVAL TIMES

   IV.   EARLY AMERICAN

    V.   19TH CENTURY AMERICA

   VI.   20TH CENTURY (Early)

  VII.   THE DEPRESSION

 VIII.   AMERICA'S ANSWER TO THE PROBLEM

        A. F.E.R.A.
        B. C.W.A.
        C. W.P.A.
        D. Social Security Legislation

<u>S O C I A L S E C U R I T Y A C T</u>

    I.   PASSAGE OF THE ACT

   II.   PURPOSE OF THE ACT

  III.   CONTENTS

        A. Social Insurance
        B. Public Assistance
        C. Health and Welfare Services

   IV.   ADMINISTRATION

    V.   POWERS

   VI.   REQUIREMENTS OF PUBLIC ASSISTANCE PROGRAMS

        A. OAP
        B. BA
        C. ADC
        D. DA

  VII.   ADMINISTRATIVE RELATIONSHIP WITH STATES

 VIII.   FINANCIAL

   IX.   SCOPE

A S S I G N M E N T

1. The Public Assistance Code of Illinois and Related Laws affecting Public Aid--1949 - 1951
2. Manual--Section X (1 through 10)

* * * * *

Third Day

PUBLIC ASSISTANCE ADMINISTRATION IN ILLINOIS

   I. EARLY HISTORY

  II. EFFECT OF THE DEPRESSION

 III. ILLINOIS EMERGENCY RELIEF COMMISSION (1932)

  IV. SCOPE

    A. Powers
    B. Duties
    C. Composition

   V. LEGISLATION

    A. OAP (June 1935)
    B. ADC (June 1941)
    C. BA (July 1943)
    D. Code(Aug. 1949)

  VI. THE ADMINISTRATION OF PUBLIC ASSISTANCE

 VII. ESTABLISHMENT OF THE ILLINOIS PUBLIC AID COMMISSION (1941)

    A. Scope
    B. Duties
    C. Composition

VIII. CONSOLIDATION OF PUBLIC ASSISTANCE PROGRAMS

  IX. EFFECT OF PUBLIC ASSISTANCE

    A. From the Standpoint of Economies

        1. On general welfare of the community
        2. On the indigent--with a view towards economic rehabilitation

B. From the Standpoint of the Social Philosophy of a Democratic
Society

1. The community--Take care of their indigent
2. Individual--towards social rehabilitation--the maintenance
of self-respect

O T H E R   P R O G R A M S

I. DEPARTMENT OF PUBLIC WELFARE

A. Institutions

1. Adult
2. Children
3. Adult--Children

B. Field Services

1. Division of Child Welfare
2. Institutes for Juvenile Research
3. Division of Youth and Community Services
4. Trachoma Control
5. Division of the Blind

II. UNIVERSITY OF ILLINOIS

A. Illinois Research and Educational Hospitals
B. Surgical Institute for Children
C. Neuropsychiatric Institute for Children
D. Illinois Eye and Ear Infirmary
E. Division of Services for Crippled Children

III. DEPARTMENT OF PUBLIC HEALTH

A. County Health Departments
B. Mobile X-Ray
C. Child-Mother Care
D. Tumor Diagnostic Service
E. Venereal Disease Treatment
F. Licensing and Inspection Service
G. Teeth Examinations

IV. DEPARTMENT OF REGISTRATION AND EDUCATION

Vocational Rehabilitation

V. DEPARTMENT OF LABOR

A. Division of Unemployment Compensation Benefits
B. Illinois State Employment Services

VI. THE LOCAL COURT AND OTHER LOCAL PUBLIC AGENCIES

A S S I G N M E N T

Eligibility Charts

* * * * *

Fourth Day

DETERMINATION OF ELIGIBILITY AND NEEDS

I.   FACTORS IN MANAGEMENT--Causes of Dependency

    A.   Social Need
    B.   Economic Need

        1.   The Standard Budget

            a.   Definition
            b.   Items covered
            c.   Evaluation of resources

        2.   The Monthly Budget Chart

II.   SOME OF THE OTHER ELIGIBILITY FACTORS

    A.   Age

        1.   OAP
        2.   ADC
        3.   BA
        4.   DA

    B.   Residence

        1.   OAP
        2.   ADC
        3.   BA
        4.   DA

    C.   Citizenship

        1.   OAP
        2.   ADC
        3.   BA
        4.   DA

* * * * *

GENERAL ASSISTANCE IN ILLINOIS

   I. DEFINITION

  II. HISTORICAL BACKGROUND

 III. HOW ADMINISTERED

  IV. HOW PROGRAM IS FINANCED

   V. RELATIONSHIP OF IPAC TO LOCAL UNITS ADMINISTERING GENERAL ASSISTANCE

A S S I G N M E N T

Manual for General Assistance and Veterans' Assistance

    Rules 1, 14, 26, 27, 28, 29, 30, 38, 39, 40 and 43

* * * * *

Fifth Day

I N T E R V I E W I N G

   I. DEFINITION

  II. PURPOSE

    A. To gain knowledge and understanding of the problem (need for financial assistance) presented by applicant or recipient.
    B. To gain information essential to determine eligibility
    C. To allow client to tell his story in his own way
    D. To explain and interpret the agency's program to the client

 III. ABOUT OURSELVES

    A. Attitudes
    B. The effect of interviewer's attitudes on client (contagion)
    C. The need for preparation in client-worker relationship

  IV. SETTING

    A. Being at ease
    B. Comfort
    C. Privacy
    D. Respect for the Dignity of the client's personality

V. BASIC PRINCIPLES

    A. Everyone has a right to apply
    B. Everyone has a right to kind, courteous and prompt attention

VI. CHARACTERISTICS OF GOOD INTERVIEWING

    A. Be alert
    B. Be permissive
    C. Be sincere
    D. Be a good listener
    E. Be frank
    F. Be a good observer
    G. In dealing with the client always indicate that you as a person represent the agency and the program
    H. Take initiative, where necessary, in guiding the Interview to cover essential points.
    I. Be alert to the emotional reactions of the client. In the interview understanding human behavior is important.

VII. RESULTS OF GOOD INTERVIEWING

    A. Produces a positive client-worker relationship
    B. Helps agency to understand client
    C. Helps client to understand agency
    D. Saves time of visitor and client
    E. Provides a better basis for more complete utilization of the public dollar
    F. Provides a better basis for constructive planning with the client

VIII. THE USE OF MOCK INTERVIEWS (role-playing) TO ILLUSTRATE GOOD INTERVIEWING PRINCIPLES

THE INVESTIGATION PROCESS IN SOCIAL WORK

I. DEFINITION

    A. Gathering information relative to economic and social needs of the family
    B. Analyzing information
    C. Interpreting information

II. PURPOSE

    A. Basic purpose of agency is related to determination of eligibility for specific categories of assistance and amount of need
    B. Mustering all resources, both tangible and intangible
    C. Protection

        1. State
        2. Applicant or recipient

III. STANDARD

    A. Uniformity and consistency
    B. Thoroughness

IV. INTERPRETATION OF AGENCY'S POLICY AND PROCEDURE

    A. To the client
    B. To the public

V. INVESTIGATION PROCEDURE

    A. Sources of information
    B. Types of Evidence

        1. Testimonial
        2. Documentary

            a. Public
            b. Personal
            c. Agency
            d. Employment
            e. Bank and Postal Savings
            f. Church

    C. Resources

        1. Rehabilitation

            a. County Department
            b. Other Local Agencies
            c. Other State Agencies

        2. Unions
        3. I.S.E.S.
        4. Self-Employment
        5. Financial and other kinds of assistance from relatives
        6. Real and Personal Property
        7. Credit
        8. Home supplied foods
        9. Public Benefits

* * * * *

Sixth Day

B U D G E T I N G

I. NEED--Factor of Eligibility

II. MEASUREMENT OF NEED BY STANDARD BUDGET

III. ITEMS OF STANDARD BUDGET

    A. Basic Items

        1. Food

            a. Monthly food allowance

                (1) Activity groups
                (2) Size of family
                (3) Breast fed babies

            b. Cod Liver Oil

        2. Household supplies and equipment
        3. Clothing

            a. Monthly clothing allowances

                (1) Activity Groups
                (2) Outsize Clothing
                (3) Persons Working
                (4) Layettes
                (5) Special Allowances for Initial Grant

        4. Personal Care
        5. Medicine Chest Needs
        6. Recreation and Education
        7. Shelter

            a. Rent
            b. Property carrying charges

        8. Utilities

            a. Heat and Cooking Fuel
            b. Light and Refrigeration
            c. Water
            d. Garbage Disposal
            e. Telephone

    B. Additional Items

        1. Restaurant Meals
        2. Room and Board
        3. Therapeutic Diets

            a. Malnutrition
            b. Reduction
            c. Pregnancy
            d. Other

4. Homemaker's Service
5. Maternity Kit
6. School Expenses
7. Expenses for Education---Trade or vocational Schools
8. Needs of the Blind
9. Expenses of Employment
10. Savings
11. Laundry
12. Household Furnishings, Replacements and Repairs
13. Property Repairs, Maintenance, Improvements and Replacements
14. Debts, Loans, or other Credit Arrangements
15. Medical Care
16. Burials
17. Others

IV. MONTHLY BUDGET CHART

DETERMINATION OF ASSISTANCE PAYMENTS

I. MONEY PAYMENT

A. What money payment means
B. Philosophy of money payments

II. AMOUNT OF GRANT

A. Minimum
B. Maximum

III. BUDGET PLANNING

A. Importance of Budget Planning
B. Accomplished By:

1. The Family Plan
2. The Assistance Plan

IV. COMMON AND SHARED EXPENSES

A. OAP and B.
B. ADC
C. Two or More Programs

1. OAP--BA
2. ADC

V. USE OF INCOME IN BUDGETING

A. OAP

1. Recipient without Income

      a. Living alone
      b. Living with Recipient's Spouse
      c. Living with Dependent Spouse and Minor Children

   2. Recipient with Income

      a. Living Alone
      b. Living with Spouse and Minor Children

   3. Recipient Living with Responsible Children
   4. Recipient Living with Other Self-Supporting Children

B. ADC

   1. Without Income

      a. All members eligible
      b. Some members eligible, some ineligible
      c. ADC Family group living with another family group

   2. With Income

      a. All members eligible
      b. Some members eligible--Some ineligible
      c. ADC Family living with another family group

C. BA

   1. Recipient without income

      a. Living alone
      b. Living with spouse and minor children

   2. Recipient with income

      a. Living alone
      b. Living with spouse and children

   3. Recipient living with parents
   4. Recipient living with relatives
   5. Recipient living with relatives other than children

VI. USE OF BUDGET RECORD FORM

R E C O R D I N G

I. THE CASE RECORD

A. Purpose--The major purpose of the case record is to make a perma-
nent record of all applications for assistance. Some of the
other purposes may be listed as follows:

1. Proofs of eligibility and need
2. Problems and service needs
3. To avoid duplication, waste of time, or loss of information in the absence of the visitor
4. To enable the supervisor to evaluate and direct the work of the visitor
5. To validate the case load and case determination within the framework of the purposes of public assistance and of established policy and procedure

B. By Whom Used

1. The visitor
2. The supervisor—as a tool in supervision
3. Administrative staff and Case Review Staff, etc.
4. Consultants

II. KINDS OF RECORDING

A. Topical—Information gathered under certain topics
B. Chronological—Information secured in each interview placed opposite the date of interview
C. Summarized—Facts are summarized periodically to give clarity and continuity
D. Narrative—Facts and processes are told in a story form
E. Standard IPAC Form for recording (SS-268 and SS-273) which is a combination of A, B, C, and D.

III. CONTENT

A. Should be meaningful and purposeful
B. Interpretation should be based on total information
C. Sources of fact should be indicated
D. Repetition should be avoided
E. Should be complete
F. Should be as concise as possible
G. The information should be pertinent
H. Opinions and attitudes of the visitor should be so labeled
I. Should be valid

IV. RECORDING IN COUNTY DEPARTMENTS OF PUBLIC WELFARE

A. Combination

1. Topical
2. Chronological

B. Topical Headings
(See II, E, Standard IPAC Form for case recording)

* * * * *

Seventh Day

ORGANIZATION OF VISITOR'S WORK

I. PLANNING A VISIT

    A. Read the Case Record
    B. Emotional Preparation
    C. Value
    D. Application

        1. Correspondence
        2. Verification
        3. Notes

    E. Recipient

        1. Reading History
        2. Checking date (present visitor responsible for case)
        3. Note taking

    F. Collateral--Know what your objective is
    G. Supervisor contact--Discuss cases that may present difficulties

II. PLANNING A FULL DAY VISITING IN THE FIELD

III. PREPARATION FOR RECORDING

    A. Value

        1. Time
        2. Monetary

    B. Material--Organized in content and sequence
    C. Setting

        1. Mental
        2. Physical

IV. PREPARATION FOR SUPERVISORY CONFERENCES

    A. Value of planned conference

        1. Time
        2. Effort
        3. Relationships between supervisor and worker

    B. Content

        1. Complete
        2. Problems Outlined

C. Approach

    1. Objectivity
    2. Sincerity

V. CASE CONTROLS AND PREPARATION OF FINANCIAL REPORTS

A. Value
B. Types--Refer to local practice

VI. LETTER WRITING

A. Purpose

    1. To secure or give information
    2. Substitute for collateral visit

        a. Interstate
        b. Inter-County

    3. Get action

B. Planning

    1. Know exactly what the letter is to accomplish
    2. Present in logical order
    3. Use simple language
    4. Create desire on person receiving letter to read
       and act upon it
    5. Be clear on what is asked for

C. Content and length

    1. Attitudes--Positive--Negative
    2. Naturalness

D. Form

    1. Paragraphing
    2. Indenting
    3. Blocking
    4. Numbering
    5. Underlining
    6. Short sentences

E. Physical Appearance

    1. Neatly typed
    2. Break long letters with readable paragraphs
    3. Short paragraphs
    4. Short, concise, clear and courteous sentences

* * * * *

Eighth Day

C O M M U N I T Y   R E S O U R C E S

I. DEFINITION OF COMMUNITY RESOURCES

II. VALUE OF COMMUNITY RESOURCES

    A. To the client
    B. To the agency
    C. To the Community at large

III. DEVELOPMENT OF RESOURCES

    A. Value of the Organization of Resources
    B. County Department's Function in Development
    C. Value of Organized Resources

IV. FOUNDATIONS OF COMMUNITY ORGANIZATION

    A. Home Rule
    B. Strength in Unity

V. LIST OF SOME COMMUNITY RESOURCES

    A. Public Official
    B. Churches and Church Organizations
    C. Schools and School Organizations
    D. Servicemen's Organizations
    E. Service Organizations
    F. Lodges, Fraternities, Societies
    G. Private Organizations
    H. Public Organizations

P U B L I C   R E L A T I O N S

I. AGENCY'S ROLE

    A. Public Contacts

        1. With Clients
        2. Through letters
        3. With public officials
        4. Through radio
        5. Through newspapers

    B. Towards its employees

II. WORKER'S RESPONSIBILITY

A. Public Contacts

    1. With clients
    2. Through letters
    3. With collaterals
    4. With friends

B. Personal attitudes towards

    1. Dress
    2. Actions
    3. Approach
    4. Office decorum
    5. Own work

III. VALUE TO THE PROGRAM

A. Public Understanding
B. Growth of Program in the Services Rendered
C. Work made Easier
D. Development of Local Resources

* * * * *

Ninth Day

UNDERSTANDING HUMAN BEHAVIOR

I. DEVELOPMENTAL STAGES IN THE HUMAN LIFE CYCLE

II. AREAS IN THE DEVELOPMENT OF HUMAN PERSONALITY

III. BASIC HUMAN NEEDS

IV. PERNATAL LIFE

V. INFANCY AND EARLY CHILDHOOD

VI. THE SCHOOL AGE

VII. GENERAL CHARACTERISTICS OF ADULTHOOD TO LATER MATURITY

VIII. OLD AGE

* * * * *

MEDICAL ASSISTANCE

I. DEFINITION

* * * * *

P R O P E R T Y

E. Property Payments
F. Income

    1. Rentals
    2. Farm Operations

II. PERSONAL

A. Kinds
B. Effect on Eligibility
C. Effect of Transfer

    1. By Applicant
    2. By Recipient

D. Availability of Personal Property Assets

LIFE INSURANCE

I. FUNDAMENTALS OF LIFE INSURANCE

A. Purpose

    1. Funds for Illness and Burial
    2. Build Estates
    3. Provide Income Because of Disability

B. Contract

    1. The Policy

        a. A full statement of parties to the contract
        b. Altered only by mutual agreement

C. Terms Used

    1. Policyholder--Person with whom contract is made
    2. Premium--Agreed sum paid by insured to keep contract
    3. Premium Payer--One who provides the funds to keep policy in Force
    4. Amount of Insurance--Face amount of policy--Amount company agrees to pay as fulfillment of contract
    5. Beneficiary--Person designated by insured to receive the death benefit

II. HOW PREMIUMS ARE CALCULATED

A. Mortality Tables
B. Interest
C. Expense

III. CLASSES OF LIFE INSURANCE

    A. Industrial
    B. Ordinary
    C. Group

IV. PLANS OF INSURANCE POLICIES

    A. Whole Life
    B. Life paid up at 65, 70, or 75
    C. Double Protection to age 65
    D. Limited Payment Life
    E. Term
    F. Endowment

V. METHOD OF DETERMINING AMOUNT OF INSURANCE

VI. ELEMENTS OF LIFE INSURANCE POLICIES

    A. Agreement
    B. Beneficiary
    C. Facility of Payment
    D. Misstatement of Age
    E. Grace Period
    F. Revival or Reinstatement
    G. Liens
    H. Non-Forfeiture of Payments

VII. SOCIAL ASPECTS

    A. Composition of Family
    B. Age and Health Status of Each Member
    C. Length of Dependency

VIII. INSURANCE ADJUSTMENT

    A. L.I.A.B.
    B. Other Companies

IX. CARE IN RECORDING DATA

X. CARE IN PRESENTATION OF INSURANCE DATA IN REGARDS TO ADJUSTMENT

* * * * *

Tenth Day

EVALUATION OF TRAINING AND EXAMINATION

* * * * *

EVALUATION OF TRAINEE BY SUPERVISOR OF TRAINING, SPRINGFIELD INSTITUTE

Upon the completion of training, the visitor will be evaluated by the Supervisor of Training, in terms of the knowledge gained during the training program. This report on the trainee will be sent to the county superintendent on IPAC Form Per-122. Copies of this report will also go to the Personnel Department as a permanent record of the visitor's attendance at the Springfield Institute.

The visitor will be given an opportunity to confer with the Supervisor of Training and discuss with him any special problems he may have with respect to the training program.

This report will be valuable both to the county superintendent and the case work supervisor in terms of further training of the visitor during the probationary period.

POST-INSTITUTE TRAINING FOR VISITOR I

I. OBJECTIVES

    A. To assist the visitor in developing professional competence under the direct supervision of the supervising case worker in order that the persons for whom Illinois Public Aid Commission is responsible receive the best service possible.

    B. To help the visitor in the further development of his ability to understand and apply eligibility factors and proper determination of needs.

    C. To help the visitor perform the necessary functions for assisting the family according to the laws of the State and the policy and procedure of the Illinois Public Aid Commission.

II. FACTORS TO BE CONSIDERED DURING THE PROBATIONARY PERIOD

    A. Techniques of Interviewing—including note-taking in the field
    B. How to use the Manual
    C. Professional Ethics

        1. Confidentiality of Information
        2. Attitude toward all staff members and working relationship
        3. Acceptance of policy
        4. Integrity, etc.

    D. Organization of Work

        1. Field Work
        2. Office Work

    E. Principles of Recording

F. Resources

    1. Individual
    2. Community--such as Red Cross, Boy Scouts, State Agencies
    3. Evaluation

G. Budgeting Process--including verification
H. Eligibility Factors--including verification
I. Correspondence

    1. How to Write Letters
    2. Evaluation

J. Reference Material

    1. Human Behavior in the Aged; the Blind; Children;
       Chronically Ill
    2. Interviewing
    3. Case Recording
    4. Special Services, etc.

K. Public Relations
L. Case Work Concepts
M. Chicago and Springfield Office Organization

※ ※ ※ ※ ※